ChiefAdvice

FREE PRINTABLE WORKBOOK

Brand Strategy Workbook

Work through the questions that shape a clear, consistent brand: purpose, values, audience, positioning, voice and what makes you different.

BRAND OR BUSINESS NAME

COMPLETED BY DATE

Free to print and use for your own business.
chiefadvice.com

START HERE

How to use this workbook

A brand strategy is a set of decisions written down so that every choice, from a logo to a reply email, points the same way.

1. **Work in order.**
   Each page builds on the one before it. Purpose and audience first, voice and design later.

2. **Write in plain words.**
   If you cannot say it simply, you probably have not decided it yet. Avoid slogans and buzzwords.

3. **Use real customers.**
   Where a page asks what customers think or say, use real quotes or conversations, not guesses.

4. **Draft first, polish later.**
   Pencil and rough answers are fine. Come back after a day and cut what is not true or not useful.

5. **Finish on the summary page.**
   The last page compresses everything onto one sheet you can share with a team, a designer or a freelancer.

BRAND SNAPSHOT: WHERE YOU ARE TODAY

What does my business do, in one plain sentence?

How long have I been operating?

How do customers describe me today?

What is one thing I want this workbook to fix?

PART 1

Brand purpose

Purpose is the reason your business exists beyond making money. It is what you would still care about on a slow month.

WHO DO I HELP, AND WHAT IS DIFFERENT IN THEIR LIFE AFTER WORKING WITH ME?

WHAT PROBLEM IN MY FIELD MADE ME START, OR KEEPS ME GOING?

ASK "WHY?" FIVE TIMES

Start with what you do. Ask why it matters. Then ask why again until you reach something you genuinely care about.

1.
2.
3.
4.
5.

MY PURPOSE IN ONE SENTENCE

We exist to _____ so that _____.

PART 1

Mission and vision

Mission describes what you do every day. Vision describes the future you are working toward.

MISSION = TODAY
What we do, for whom, and how.

VISION = THE FUTURE
What the world looks like if we succeed.

MISSION DRAFT: WE HELP [WHO] TO [ACHIEVE WHAT] BY [HOW].

VISION DRAFT: IN FIVE YEARS, [WHAT WILL BE TRUE FOR OUR CUSTOMERS AND OUR FIELD]?

CHECK: COULD A NEW TEAM MEMBER REPEAT THESE FROM MEMORY? WHAT NEEDS SHORTENING?

PART 1

Core values

Choose three to five values that really guide how you work. A value you will not act on when it costs you something is only a word on a wall.

CIRCLE OR TICK UP TO FIVE

- ☐ Honesty
- ☐ Quality
- ☐ Simplicity
- ☐ Curiosity
- ☐ Reliability
- ☐ Generosity
- ☐ Courage
- ☐ Craft
- ☐ Respect
- ☐ Speed
- ☐ Fairness
- ☐ Creativity
- ☐ Care
- ☐ Independence
- ☐ Community
- ☐ Growth
- ☐ Excellence
- ☐ Humility
- ☐ Transparency
- ☐ Fun
- ☐ Accountability
- ☐ Sustainability
- ☐ _____
- ☐ _____

MY VALUE	WHAT IT LOOKS LIKE IN DAILY WORK	WHAT IT RULES OUT (WHAT WE WILL NOT DO)

PART 2

Target audience

Describe the people you most want to serve. A clear audience is not a limit. It is what makes your message sound like it was written for someone.

WHO THEY ARE
Role, situation, business type, life stage.

WHAT THEY ARE TRYING TO ACHIEVE

WHAT THEY VALUE WHEN CHOOSING
Price, speed, trust, quality, convenience, values.

WHERE THEY LOOK FOR HELP
Search, friends, communities, social platforms, events.

WHAT THEY ALREADY BELIEVE ABOUT MY FIELD

WHO IS NOT A GOOD FIT FOR MY BUSINESS
Saying no keeps your message clear.

MY AUDIENCE IN ONE SENTENCE

PART 2

Customer problems

People buy to solve a problem. Describe the top three in their words, and what happens if the problem stays unsolved.

PROBLEM (IN THEIR WORDS)	HOW IT SHOWS UP IN THEIR DAY	WHAT THEY TRY INSTEAD	WHAT IT COSTS THEM IF UNSOLVED

WHERE DO I HEAR THESE PROBLEMS? (REVIEWS, MESSAGES, CALLS, COMMENTS)

WHICH ONE PROBLEM AM I BEST PLACED TO SOLVE, AND WHY ME?

THE EXACT WORDS CUSTOMERS USE THAT I COULD USE IN MY OWN WRITING

PART 3

Brand positioning

Positioning is the place you want to hold in your customer's mind compared with the alternatives.

POSITIONING STATEMENT

For [audience] who [need or problem], [brand] is the [category] that [main benefit], because [reason to believe].

THE ALTERNATIVES MY CUSTOMERS CONSIDER (COMPETITORS, DOING IT THEMSELVES, DOING NOTHING)

WHAT I WANT TO BE KNOWN FOR

WHAT I DO NOT WANT TO BE KNOWN FOR

THE PROOF THAT BACKS UP MY POSITION (RESULTS, EXPERIENCE, PROCESS, REVIEWS)

PART 3

Unique value proposition

Your value proposition says what you offer, who it is for, and why it is better for them, in a few clear lines.

HEADLINE: THE MAIN BENEFIT IN ONE LINE

Clear beats clever.

SUBHEADLINE: WHO IT IS FOR AND HOW IT WORKS

THREE BENEFITS, EACH WITH A PROOF POINT

#	BENEFIT	PROOF (RESULT, FEATURE, GUARANTEE, EVIDENCE)

TEST IT

Show your headline to someone who does not know your business. Ask them three questions and write what they say.

Questions: What do you think we sell? Who do you think it is for? Why would someone choose us?

PART 4

Brand personality

If your brand were a person, how would they behave? Mark where you sit on each scale, then choose three to five words that describe the character.

Playful	○——○——○——○——○	Serious
Casual	○——○——○——○——○	Formal
Bold	○——○——○——○——○	Reserved
Traditional	○——○——○——○——○	Modern
Luxurious	○——○——○——○——○	Practical
Expert	○——○——○——○——○	Friendly guide

THREE TO FIVE WORDS THAT DESCRIBE MY BRAND'S CHARACTER

1. _____
2. _____
3. _____
4. _____
5. _____

IF MY BRAND WERE A PERSON, WHO WOULD THEY BE?

Describe their habits and manner.

_____

_____

_____

WE ARE / WE ARE NOT

Example: bold, not pushy.

_____

_____

_____

PART 4

Brand voice

Voice is how your brand sounds in writing and in speech. Decide it once so every message sounds like the same business.

VOICE TRAIT	SOUNDS LIKE (AN EXAMPLE PHRASE)	DOES NOT SOUND LIKE

WORDS AND PHRASES WE USE

WORDS AND PHRASES WE AVOID

SITUATION	HOW WE WOULD SAY IT
Welcoming a new customer	
Apologizing for a mistake	
Announcing something new	
Asking for a sale	

REWRITE TEST: TAKE A RECENT MESSAGE AND REWRITE IT IN OUR VOICE

PART 5

Competitor differentiation

You do not need to be better at everything. You need to be clearly different in a way your customers care about.

COMPETITOR OR ALTERNATIVE	WHAT THEY PROMISE	WHERE THEY ARE STRONG	WHERE CUSTOMERS MAY FEEL UNDERSERVED

WHAT IS TRULY DIFFERENT ABOUT THE WAY I WORK, WHAT I OFFER OR WHO I SERVE?

WHICH OF THOSE DIFFERENCES DO CUSTOMERS ACTUALLY CARE ABOUT? (CHECK WITH REAL CUSTOMERS)

OUR "ONLY WE" STATEMENT

We are the only _____ that _____.

SUMMARY

Brand on a page

Copy your best answers here. Keep this sheet where you and anyone who helps you can see it.

PURPOSE

MISSION

VISION

CORE VALUES

AUDIENCE

CUSTOMER PROBLEM WE SOLVE

POSITIONING STATEMENT

VALUE PROPOSITION

PERSONALITY WORDS

VOICE IN THREE WORDS

WHAT MAKES US DIFFERENT